

Accelerated SAP		BUSINESS PROCESS PROCEDURE	
State of Utah	Organization/Area: Agency Payroll Administration	Title of Process: Research Personnel Master Data	
File Name:	H:\TRAINDOC\FOLIO\Payroll\convert\6 Research Personnel Master Data.doc	Release:	R/3 4.6C
Responsibility:	Payroll Coordinator	Status:	Issued: 2/26/200 Revised: 10/27/2003

Overview

Trigger:

Agency payroll/personnel staff needs to view an employee's personnel master data.

Business Process Procedure Overview	
<p>Personnel data is stored as Information Types, (infotypes). Related groups of commonly used infotypes are listed on the "Display HR Master Data" screen under tabs labeled: Master Data, Payroll, Taxes, Time, URS, and PEHP. Following is the name and short description of each infotype listed under each tab:</p> <p>Master Data:</p> <ul style="list-style-type: none"> • Actions – Changes that affected multiple information types and the related start and end dates of the action (e.g. conversion of data from the old system, new hires, terminations) • Organizational assignment – Employee's home agency, org, dist and payroll groupings • Personnel Data – Name, SSN, birth date and gender • Addresses – Home address and telephone number • Date Specifications – Various dates e.g. hire dates, leave accrual date, etc. • Residence Status – Citizen or Non-resident alien <p>Payroll:</p> <ul style="list-style-type: none"> • Payroll Status –Process dates for pay and time data • Basic Pay – Pay scale group and hourly rate of the employee • Bank Details – Bank accounts and amounts for direct deposits • Recurring Payments/Deductions – Fixed payments and deductions that repeat periodically usually each payday • Additional Payments – Non-recurring payments and deductions (Pay advance balances are also shown here) <p>Taxes:</p> <ul style="list-style-type: none"> • Residence Tax Area – Names of taxing authorities of the employees residence (i.e. Federal/State) • Work Tax Area – Names of tax authorities of the employee's work location (i.e. State/Local) • Withholding Info W4/W5 US – Tax withholding and EIC form data <p>Time:</p> <ul style="list-style-type: none"> • Planned Working Time – Work schedule and Time Management Status • Time Recording Info – Comp/Excess limit codes and Comp/OT pay code • Quota Corrections – History of adjustments to leave balances • Time Quota Compensation – History of leave balances that have been paid down • Employee Remuneration Info – History of other payments that originated in the time entry process <p>URS:</p> <ul style="list-style-type: none"> • Savings Plans – Retirement plan and deferred compensation plans <p>PEHP:</p> <ul style="list-style-type: none"> • Health Plans – Employer provided medical and dental insurance plans • Insurance Plans – Employer provided life insurance coverage 	

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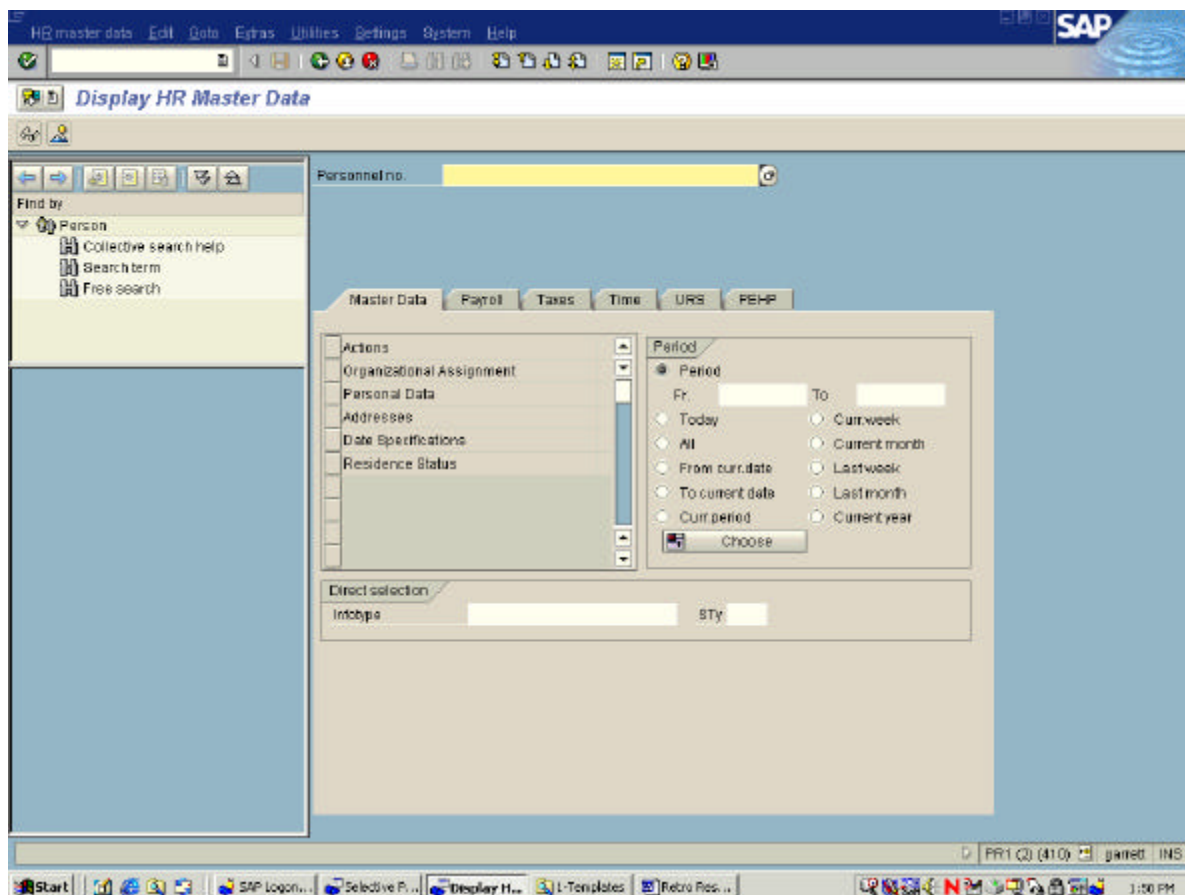
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Procedural Steps

1.1 How to access Personal Administration data

Via Menus	Agency Payroll Coordinator → Display HR Master Data
Via Favorites Menu	Display HR Master Data

Double click on “Display HR Master Data” and the following screen will appear:



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This is the beginning point for viewing all Personnel Administration data.

Input Fields	Field Values
Personnel no.	Employee numbers are used to select specific employees
Tabs of Grouped Information Types	Click on one of the tabs to get a list of commonly used information types: i.e. Payroll lists information types for Payroll Status, Basic Pay, etc.
Infotype	Enter the number of the Information type you wish to view (i.e. 8 for Basic Pay)

- 1.2 Enter the employee's Personnel number and press enter.** (If you do not know the employee's number, click on the list box next to the "Personnel no." field and locate the employee number by entering their name.) The following screen will appear:

The screenshot shows the SAP 'Display HR Master Data' window. The 'Personnel no.' field contains '111128' and the 'Name' field contains 'BENJAMIN FRANKLIN'. The 'EE group' is '1' and the 'EE subgroup' is '71'. The 'Master Data' tab is selected, showing a list of information types with checkboxes for selection. The 'Period' section shows options for selecting a time range. The 'Direct selection' section shows fields for 'Infotype' and 'STp'.

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1.3 The top of the right panel shows the employee's name and the following key information:

- Employee Group – Controls pay and benefit processes. Two examples: 1) Employees in group 2 will not accrue annual, sick leave, or get holidays. 2) Employees in groups 5 through 8, T, R, and D cannot be paid for anything that occurred later than the effective date of the action that placed them in one of those groups. However, they can still be paid for anything that occurred earlier than the effective date of the LWOP or termination.
 - 1 Active / Leave Accrual / WrkComp / Unemployment / LTD / Life
 - 2 Active / No Leave Accrual / WrkComp / Unemployment
 - 3 Active / FT Judges & Elected Officials / No Leave Accrual / WkrComp / LTD / Life
 - 4 Active / Legislators & Boards / No Leave Accrual / WkrComp
 - 5 LWOP / Leave Accrual / Emplr Paid Insurance (Not yet available)
 - 6 LWOP / Leave Accrual / No Emplr Paid Ins. (Not yet available)
 - 7 LWOP / No Leave Accrual / Emplr Paid Ins. (Not yet available)
 - 8 LWOP / No Leave Accrual / No Emplr Paid Insurance
 - T Terminated
 - R Retired
 - D Deceased
- Employee Subgroup - Determines which Overtime Rules apply
 - 71 NonExempt / Wkly > 40 C/OT @ 1.5
 - 72 NonExempt / QuadWkly > 160 C/OT @ 1.5
 - 73 NonExempt / BiWkly > 80 @ 1 / > 87 @ 1.5
 - 74 NonExempt / QuadWkly > 171 C/OT @ 1.5
 - 75 NonExempt / QuadWkly > 212 C/OT @ 1.5
 - 76 NonExempt / BiWkly > 80 OT Paid @ 1.0 (No Comp)
 - 77 NonExempt / QuadWkly > 171 C/OT @ 1.5
 - 78 NonExempt / Daily > 8 OT Paid @ 1.5 (No Comp)
 - 90 Exempt / BiWkly > 80 Earn Comp @ 1.0 (No OT)
 - 91 Exempt / All Hours Paid @ 1.0 (No Comp)
 - 92 Exempt / BiWkly > 80 Earn Comp @ 1.0 & Charge When Earned
 - 93 NonExempt / QuadWkly > 160 Earn Comp @ 1.0

1.4 Click on one of the tabs labeled Master Data, Payroll, Taxes, Time, URS or PEHP, to see a list of infotypes associated with each tab.

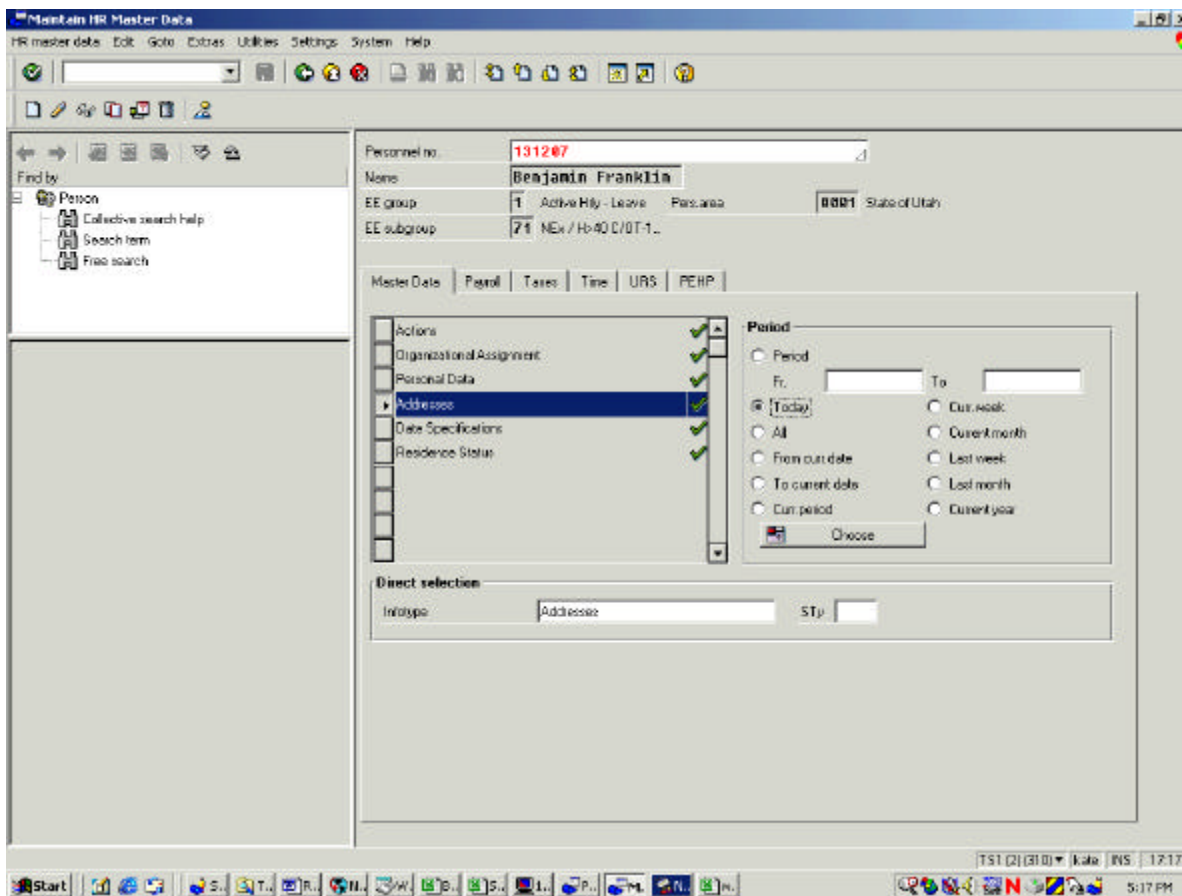
1.5 To select an infotype for viewing, click on the box to the left of the name of the infotype.


1.6 The system maintains a history of changes to infotypes. For example, an employee's address may change several times during their employment with the

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State. The “Period” panel to the right allows you to view the data that was in effect for a specific period. The following screen shows an example of selecting the employee’s address as of today:



Click on the view icon  and the employee’s current address and phone number will appear as shown below.

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The screenshot shows the 'Display Addresses' window in SAP. On the left is a navigation pane with 'Person' selected. The main area displays data for personnel number 131207. Personal data includes Name: Benjamin, Status: Active, EE group: 1, EE subgroup: 71, Start date: 02/05/2002, and End date: 12/31/9999. The address section shows Address type: Permanent residence, Address line 1: 1776 Liberty Dr, City/country: SLC, State/zip code: UT 84121, and Country key: USA. There are also fields for telephone numbers and extensions.

- 1.7 To get a definition of a data element within an infotype, click on the data element label and press F1.** For example, if you click on “Address type” and press F1, the following pop-up appears:

The screenshot shows a 'Performance Assistant' pop-up window. On the left, the 'Address' infotype is selected, and 'Address type' is highlighted. The main pane is titled 'Address Record Type' and contains the following text: 'The address type specifies whether the address in question is the employee's permanent or temporary place of residence. It is part of personal data.'

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1.8 To see a history of changes to the infotype, click on the overview icon



in the upper left corner and the following screen will appear:

S Ty	Start date	Address	Telephone no	LI	2nd address line
1	02/05/2002	1778 Liberty Dr	8015551776		
1	01/05/2002	2501 E. Carolina Dr	8019436723		

1.9 Click in box to the left of a line item on the list to select that item. Then click on the detail view icon



in the upper left corner to see the details of that item.

1.10 The following pages describe the information contained in the infotypes listed in the preceding "Overview" section.

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Infotypes under the tab – Master Data:

- Actions – Contains a history of changes that affected multiple information types and the related start and end dates of the action (e.g. conversion of personnel master data from the old system, new hires, terminations). Here is an example of the list of actions:

The screenshot shows the 'List Actions' window in SAP. The employee details are: Pers.no. 131207, Name Benjamin Franklin, EE group 1, EE subgroup 71, Personnel at 0001, State of Utah, SSN 111-11-1111, and a date range from 01/01/1800 to 12/31/9999. The table below lists actions:

Start date	End date	Act	Action type	Act R	Reason/Action	Cuc	Emp	Spe
01/05/2002	12/31/9999	CU	Sol Conversion				3	1

The list shows only one such action has occurred that being the conversion of the employee's personnel data from the old payroll system to the new system.

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- Organizational Assignment – Shows the employee's home agency org distribution and payroll groupings:

The screenshot shows the SAP 'Display Organizational Assignment' window. The left sidebar has 'Person' selected under 'Find by'. The main area displays the following data:

Personnel no.	111128	Name	BENJAMINE	Status	Active
EE group	1 Active Hly - Leave	Personnel	0001	State of Utah	
EE subgroup	71 NEX / H>40 C/OT-1.5	SSN	111-11-1128		
Start	01/05/2002	to	12/31/9999	Chng	06/07/2002 CONVERT

Enterprise structure

CoCode	1000	State of Utah	Leg.person	
Per. area	0001	State of Utah	Subarea	0130 Career Svc Rev
Cost obj			Bus. area	

Personnel structure

EE group	1 Active Hly - Leave	Payroll area	00 Biweekly
EE subgroup	71 NEX / H>40 C/OT-1.5	Contract	091 SEND

Organizational plan

Position	69815254	DL CENTRAL OFC TECH
Job key	00000000	
Exempt		
Org. unit	00000000	
Org. key	130 10100001	
Supervisor	0	

Administrator

PerAdmin	<input type="checkbox"/>
Time	<input type="checkbox"/>
PayAdmin	<input type="checkbox"/>

The taskbar at the bottom shows the Start button and several open applications including SAP, Train, Res, Disp, Nav, Work, Book, and SAP again. The system clock shows 6:04 PM on 10/27/2003.

The above screen shows the employee is currently working for the State of Utah in the Career Service Review Agency, (Subarea 0130). He is an active hourly employee, (EE group) who can accrue leave; is not exempt from FLSA and earns overtime at time and one half, (EE subgroup); is on the biweekly payroll cycle, (Payroll area); is on the State Employees Non-Contributory retirement plan; his position is "DI CENTRAL OFC Tech", (Position); and his home agency, low org, and distribution code is 130 1010 0001, (Organization key).

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- Personal Data – Displays the employee's name, SSN, birth date and gender as shown below:

The screenshot shows the 'Display Personal Data' window in SAP. The window has a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. On the left is a 'Find by' sidebar with options: Person, Collective search help, Search term, and Free search. The main area displays the following data:

Personnel no	131207	Name	Benjamin	Status	Active
EE group	1	Active Hly - Leave	Personnel at	0001	State of Utah
EE subgroup	71	NEA / Ho-40 C/DT-1.5	SSN	111-11-1111	
Start	07/16/1959	To	12/31/9999	Chng	02/05/2003 PHANSEN

Name

Form of add		Name format	00
Last name	Franklin	Bathname	
First name	Benjamin	Second name	
Mid. name		Initials	
2nd title		Known as	
Suffix			
Name	Benjamin Franklin		

HR data

SSN	111-11-1111
Birth date	07/16/1959
Comm lang	English
Nationality	
Mar status	

Gender

☐ Female ☒ Male ☐ TBD

The window title bar shows 'TST (1) (310) | Kate | JWR | 08:21'. The taskbar at the bottom shows the Start button and various application icons, with the system clock displaying '8:23 AM'.

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- Addresses – Displays Home address and telephone number as shown:

The screenshot shows the 'Display Addresses' window in SAP. The left sidebar contains a 'Find by' section with options: Person, Collective search help, Search item, and Free search. The main area displays personal data for 'Benjamin' (Personnel no. 131207, Status Active) and address details. The address is categorized as 'Permanent residence' and includes the following information:

Address type	Permanent residence		
c/o			
Address line 1	1776 Liberty Dr		
Address line 2			
City/county	SLC		
State/zip code	UT	Utah	84121
Country key	USA		
Telephone number	001 555-1776		
Communications	0	Extn	
	0	Extn	
	0	Extn	
	0	Extn	

The window title is 'Display Addresses' and the menu bar includes Info type, Edit, Goto, Extras, System, and Help. The taskbar at the bottom shows the Start button and various application icons, with the system clock indicating 5:23 PM on 10/27/2003.

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- Date Specifications – Displays various dates e.g. hire dates, leave accrual dates, etc. as shown:

Display Date Specifications

Infotype: Edit: Goto: Extras: System: Help

Find by: Person

Collective search help
Search term
Free search

Personnel no: 131207 Name: Benjamin Status: Active
 EE group: 1 Active Hly - Leave Personnel at: 0001 State of Utah
 EE subgroup: 71 NEa / Ho-40 C/DT-1.5 SSN: 111-11-1111
 Start: 01/05/2002 to: 12/31/9999 Chng: 01/09/2003 CONVERT

Date Specifications:

Date type	Date	Date type	Date
2A Orig Hire Date - UT	10/17/1998	2B Cur Hire Date - UT	10/17/1998
2G Leave Accrual - UT	10/17/1998		

TST (1) (310) Kate JVR 10.06
10:06 AM

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- Residence Status – Displays Citizen or Non-resident alien as shown:

The screenshot shows the 'Display Residence Status' window in SAP. The window title is 'Display Residence Status'. The menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The toolbar contains various icons for navigation and actions. On the left, there is a 'Find by' section with a tree view showing 'Person' and sub-items like 'Collective search help', 'Search item', and 'Free search'. The main area displays employee data for 'Benjamin'. The data is organized into fields: 'Personnel no.' (131207), 'Name' (Benjamin), 'Status' (Active), 'EE group' (1), 'Active Htg - Leave', 'Personnel at' (0001), 'State of Utah', 'EE subgroup' (71), 'NEs / Ho-40 C/OT-1.5', 'SSN' (111-11-1111), 'Start' (01/05/2002), 'to' (12/31/9999), 'Chg' (01/09/2003), and 'CONVERT'. Below this, there are two sections: 'Personal identification' and 'Employment verification'. The 'Personal identification' section has fields for 'Residence status' (set to 'Citizen'), 'ID type', 'Issuing Authority', 'ID number', 'Issuing date', and 'Validity end date'. The 'Employment verification' section has fields for 'Work permit', 'Issuing Authority', 'Work permit number', 'Issuing date', and 'Expiry of work perm.'. The window is running on a Windows XP desktop with a taskbar at the bottom showing the Start button, several application icons, and the system clock at 10:10 AM on 10/27/2003.

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Infotypes under the tab – Payroll:

- Payroll Status – Displays the process dates for pay and time data as shown below:

Display Payroll Status
Infotype: Edit: Goto: Extras: System: Help

Find by: Person
 Collective search help
 Search term
 Free search

Personnel no: **131207** Name: **Benjamin** Status: **Active**
 EE group: **1** Active Hlf - Leans Personnel at: **0001** State of Utah
 EE subgroup: **71** NEA / Ho-40 C/DT-1.5 SSN: **111-11-1111**
 Chng: **02/05/2003** **HAUSTIN**

Payroll/retroactive accounting
 Earliest RA date: Accounted to: **11/22/2002**
 Run payroll up to: Earliest MD change: **10/26/2002**
 Do not account after: Most date chng.bonus: **10/26/2002** [Bonus info](#)
☐ Payroll locked ☐ Payroll correction

Time evaluation
 Earliest rec date: **10/12/2002** Pass calendar from: **10/20/2002**
 PDC installation: **11/23/2002**
☐ PDC error indicator

Other data
 Initial input: **01/08/2003** **09:07:49**

TS1 (11310) Kate DVR 10:28
 10:20 AM

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- Basic Pay – Displays the pay scale group and hourly rate of the employee as shown below:

Display Basic Pay

Infotype: Edit Select Wage types Extras System Help

Salary amount: Payments and deductions

Find by: Person

- Collective search help
- Search term
- Free search

Personnel no: 131207 Name: Benjamin Status: Active

EE group: 1 Active Hly - Leave Personnel at: 0001 State of Utah

EE subgroup: 71 NEa / Ho-40 C/DT-1.5 SSN: 111-11-1111

Start: 10/26/2002 to: 12/31/9999 Chng: 02/05/2003 HAUSTIN

Payment type: 0 Basic contract

Pay scale

Reason: ☐ No reason Capital M: 100.00

Type: S1 Pay indicator #1: Wkts/period: 80.00 Bi-weekly

Area: S1 Pay indicator #1: Next increase:

Group: STEP009 Level: 00 Annual salary: 61,318.00 USD

Wage	Wage type name	Dc	Amount	Currency	Inc	Ac	Number	Unit
1000	Hourly rate		29.48	USD	T	F	0.00	

10 02/07/2003 - 12/31/9999 29.48 USD

TST (1) (310) Kate DWR 10:51

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- Bank Details – Displays the bank accounts and amounts for direct deposits of the employee as shown:

Change Bank Details

Infotype: Edit: Goto: Extras: System: Help

Find by: Person

- Collective search help
- Search term
- Free search

Personnel no. **131207** Name **Benjamin** Status **Active**

EE group **1** Active Hly - Leave Personnel at **0001** State of Utah

EE subgroup **71** NEa / Ho-40 C/DT-1.5 SSN **111-11-1111**

Start **01/05/2002** to **12/31/9999** Chng **01/09/2003** **CONVERT**

Bank details:

Bank details type **Main bank**

Payee **Benjamin Franklin**

Postal code / city **84121** **SLC**

Bank country **USA**

Bank key **12345678** **U S BANK/ST PAUL MN**

Bank account number **1555555555** Bank control key **01**

Payment method **P** Bank transfer (ACH PPD)

Purpose

Payment currency **USD**




TST (1) (310) Kate JWR 13:21

Start Research Personnel ... SAP Logon Pad 460 Display Bank Details Change Bank Det... 1:21 PM

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- Recurring Payments/Deductions – Displays the fixed payments and deductions that repeat periodically usually each payday.

In this example, the employee has one recurring deduction that is for Life Insurance PEHP for 2.62 per pay period. If the employee had other recurring payments or deductions, they can be displayed by clicking on the “Previous record” or “Next record” icons   in the upper left corner. An over view of all of the employee’s recurring payments/deductions can be viewed by clicking on the “Overview” icon .

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- Additional Payments – Displays Non-recurring payments and deductions (Pay advance balances are also shown here)




Display Additional Payments

Personnel no: 131207 Name: Benjami... Status: Active
 EE group: 1 Active Hrly - Leave Personnel ar: 0001 State of Utah
 EE subgroup: 71 NEx / H>40 O/OT-... SSN: 111-11-1111
 Chng: 10/27/2003 PHANSEN

Additional Payments

Wage type: 1145 Moving Reimb Assist
 Amount: 800.00 USD
 Number/unit: 0.00
 Date of origin: 10/11/2003
 Default date: 00
 Assignment number:
 Reason for change:

DV1 (1) (110) Duke OVR

This example shows the employee had an \$800 payment for taxable moving reimbursement. If the employee had other one time payments or deductions, they can be displayed by clicking on the “Previous record” or “Next record” icons   in the upper left corner. An over view of all the employee’s one time payments/deductions can be viewed by clicking on the “Overview” icon .

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Responsibility:	Payroll Coordinator	Status:	Issued: 2/26/200 Revised: 10/27/2003

Infotypes under the tab – Taxes:

- Residence Tax Area – Displays the names of taxing authorities of the employee's residence (i.e. Federal/State).

Display Residence Tax Area

Infotype: Edit Goto Extras System Help

Find by: Person
 Collective search help
 Search term
 Free search

Personnel no.: 131207 Name: Benjamin Status: Active
 EE group: 1 Active Hlf - Leave Personnel at: 0001 State of Utah
 EE subgroup: 71 NEa / Ho-40 C/OT-1.5 SSN: 111-11-1111
 Start: 01/05/2002 to: 12/31/9999 Chg: 01/08/2003 CONVERT

Resident data

Tax area: UT State of Utah

Tax Authorities in Area

Tax authority		Tax Level	
<input type="checkbox"/>	FED Federal	A	Federal
<input type="checkbox"/>	UT Utah	B	State
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

TS1 (1) (310) | kaka | DVR | 12:14

Start | T... | S... | S... | T... | J... | C... | W... | N... | S... | T... | W... | D... | L... | 12:14 PM

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- Work Tax Area – Displays the names of tax authorities of the employee's work location (i.e. Utah).

Display Work Tax Area

Infotype: Edit: Goto: Extras: System: Help

Find by: Person

Collective search help
Search item
Free search

Personnel no.: 131207 Name: Benjamin Status: Active
 EE group: 1 Active Hly - Leave: Personnel at: 0001 State of Utah
 EE subgroup: 71 NEa / Ho-40 C/DT-1.5 SSN: 111-11-1111
 Start: 01/05/2002 to: 12/31/9999 Chg: 01/09/2003 CONVERT

Work tax data

Tax area: UT State of Utah
 Allocation percent: 100.00 %

Tax Authorities in Area

Tax authority	Tax Level
UT Utah	0 State

TST (1) (310) Kate DVR 12:16
 12:16 PM

Accelerated SAP		BUSINESS PROCESS PROCEDURE	
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- Withholding Info W4/W5 US – Displays the tax withholding and EIC form data.

Display Withholding Info W4/W5 US

Infotype: Edit Goto Extras System Help

Find by:

Person

- Collective search help
- Search item
- Free search

Personnel no.: 131207 Name: Benjamin Status: Active

EE group: 1 Active Htg - Leave Personnel at: 0001 State of Utah

EE subgroup: 71 NEs / Ho-40 C/OT-1.5 SSN: 111-11-1111

Start: 11/09/2002 to: 12/31/9999 Chg: 01/26/2003 KGAUIN_A

Status:

Tax authority: FED Federal Tax level: A Federal

Filing status: 01 Single

Exemptions:

Allowances: 3

☐ Tax exempt indicator ☐ IRS mandates

Withholding adjustments:

Add withholding: 0.00 USD

Default formula: 1 PERCENTAGE METH Alt. formula: 0

W-5 filing status:

EIC status: ☐

Overrides (from Infotype 0234)

From date	End date	Supplemental method	Tax override	Enpl

TS1 (1) (310) kate JWR 12:19

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Infotypes under the tab – Time:

- Planned Working Time – Displays the Work schedule and Time Management Status

Display Planned Working Time

Infotype: Edit: Goto: Extras: System: Help

Work schedule

Find by: Person

Collective search help

Search term

Free search

Personnel no. 131207 Name Benjamin Status Active

EE group 1 Active Hlf - Leave Personnel at 0001 State of Utah

EE subgroup 71 NEa / Ho40 C/DT-1.5 SSN 111-11-1111

Start 01/05/2002 To 12/31/9999 Ctg. 01/08/2003 CONVERT

Work schedule rule

Work schedule rule U200 10 MTWTF

Time Mgmt Status 9 - Time evaluation of planned times

Working week Saturday to Friday, no times

☐ Full-time employee Additional time ID 20

Working time

Employment percent 100.00

Daily working hours 10.00

Weekly working hours 40.00

Monthly working hrs 80.00

Annual working hours 2080.00

Weekly workdays 4.00

TS1 (11310) Data DVR 13:52

In this example, the employee's work schedule is U200, 10 Hours MTWTF, and his Time Management status is 9 - Time evaluation of planned times. (This employee will be automatically paid 10 hours a day for Monday, Tuesday, Wednesday and Friday of each workday unless time is entered on his time entry screen.) To get a list of all possible work schedules, click in the box to get an arrow and then click on the arrow to get the list in a pop-up window. The "Additional time ID" on this screen shows the pay period in which they will lose all of their accumulated comp time if the are FLSA exempt employee. (In this case, pay period 20.)

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- Time Recording Info – Displays the Comp/Excess limit codes and Comp/OT pay code

Display Time Recording Info

Infotype: Edit: Goto: Extras: System: Help

Find by: Person

Personnel no: 131207 Name: Benjamin Status: Active

EE group: 1 Active Hly - Leave Personnel at: 0001 State of Utah

WS rule: 0208 10MTWF SSN: 111-11-1111

Start: 01/05/2002 To: 12/31/9999 Chg: 01/09/2003 CONVERT

Time ID:

Time rec ID no: 00131207

Interface data:

Subsystem grouping: EH

Access control group: CT

Time variables:

Additional indicator: T

The “**Interface data**” panel shows the Excess leave limit code in the “Subsystem grouping” box; the Comp time leave limit code in the “Access control group” box and the pay overtime or accrue comp time indicator in the “Additional indicator” box. To get definitions of the codes, click in the box to get an arrow and then click on the arrow to get the pop-up window shown below:

Su...	Text
001	SAP default 001
002	SAP default 002
E0	Excess limit = 0
E4	Excess limit = 40
E9	Excess limit = 999
EH	Excess limit = 80
EX	Excess limit = 80, then deleted

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- Quota Corrections – History of adjustments to leave balances

The screenshot shows the SAP 'Display Quota Corrections' interface. At the top, there's a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'Display Quota Corrections'. Underneath, there are tabs for 'Personal work schedule', 'Activity allocation', and 'Cost assignment'. The 'Personal work schedule' tab is active.

The main data area displays the following information:

- Personnel no:** 131207
- Name:** Benjami ...
- Status:** Active
- EE group:** 1
- Active Hrly - Leave:** Personnel ar 0001
- State of Utah**
- WS rule:** U208
- 10 MTWF**
- SSN:** 111-11-1111
- Start:** 10/11/2003
- Chg.:** 10/27/2003
- PHANSEN**

Below the main data, there's a section for 'Absence quota type' with a value of '96' and a description 'Excess Earned (UT)'. There are also buttons for 'Change accrual entitlement' and 'Change transfer time'.

The 'Change accrual entitlement' section shows a 'Quota number' of '15.00000' and 'Hours'. It has three radio buttons: 'Increase generated entitlement' (selected), 'Reduce generated entitlement', and 'Replace generated entitlement'.

The 'Change transfer time' section shows a 'Transfer' button and a text field with 'Transfer collected entitlement immediately'.

At the bottom right, there's a status bar with 'DV1 (1) (110)', 'Duke', and 'OVR'.

This example shows that 15 hours were added to the employee's Excess Earned leave balance on 10/27/2003. These hours are available for use anytime after the start date of 10/11/2003.

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- Time Quota Compensation – Displays leave balances that have been paid down.

Display Time Quota Compensation

Infotype: Edit Goto Extras System Help

Find by: Person

Personnel no.: 131207 Name: Benjamin Status: Active
 EE group: 1 Active Htg - Leave Personnel at: 0001 State of Utah
 WS rule: 0208 10MTWF SSN: 111-11-1111
 Start: 02/01/2003 Chg: 02/21/2003 PHANSEN

Comp. method: 90 Excess Paydown

Compensation specifications:




Time quota type: 96 Excess Earned (UT)
 Compensation rule: 000
 No. to compensate: 15.00000
☐ Do not account

Compensation using default ☒
 Manual compensation

Absence quotas


Alt	Quota text	Entit.	Unit	Comp.	Rem.	W/T	Amount
96	Excess Earned (UT)	23.00000	Hours	15.00000	8.00000		

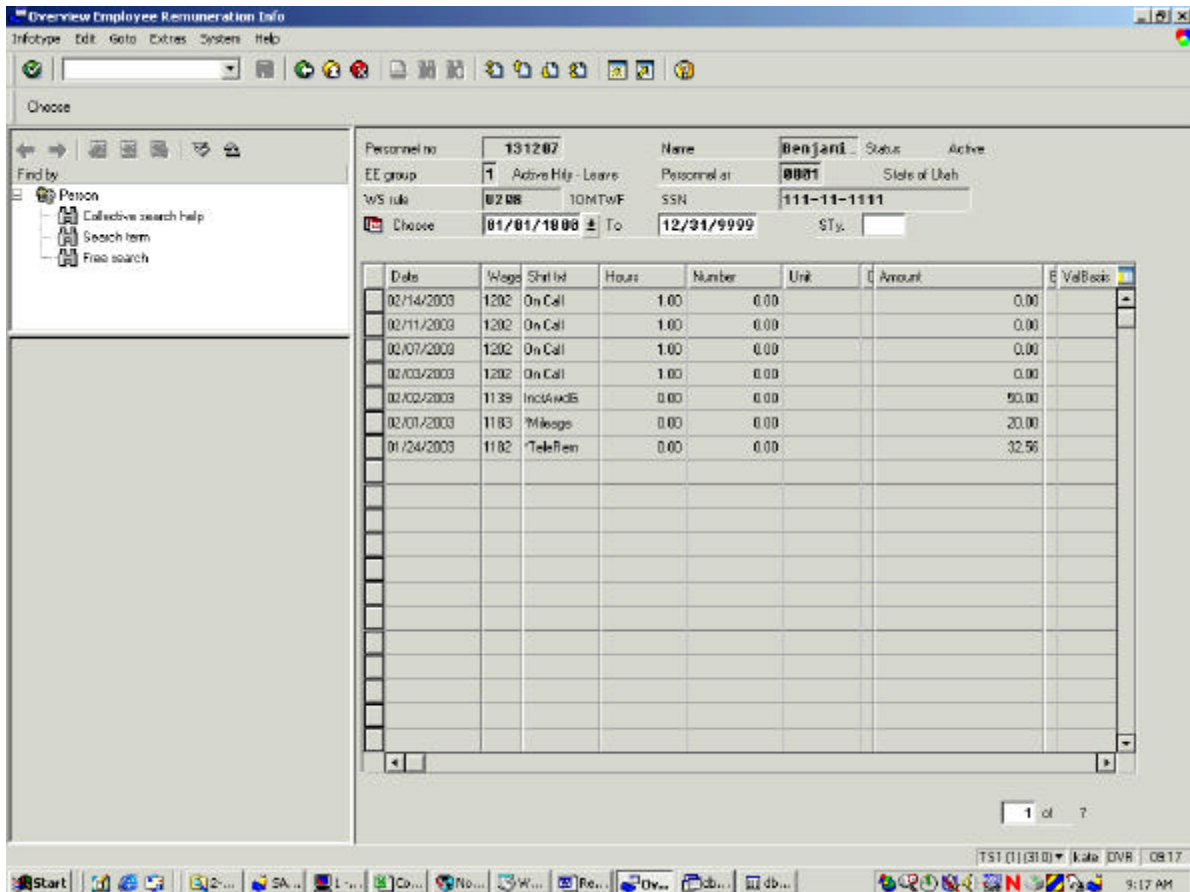
TS1 (1) (310) Kate JVR 16:15 4:15 PM

In this example, the employee was compensated, (paid), for 15 hours of Excess leave which resulted in a remaining balance of 8 hours. If the employee had other leave pay downs, they can be displayed by clicking on the “Previous record “ or “Next record” icons   in the upper left corner. An over view of all the employee's leave pay downs can be viewed by clicking on the “Overview” icon .

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- Employee Remuneration Info – Shows a history of other payments that originated in the time entry process. To get the list shown below, select one “Employee Remuneration Info.” and click on the overview icon .



Overview Employee Remuneration Info

Infotype: Edit: Goto: Extras: System: Help

Choose

Personnel no. 131207 Name Benjamin Status Active

EE group 1 Active Hly - Leave Personnel at 0001 State of Utah

WS rule 0208 10MTWF SSN 111-11-1111

Choose 01/01/1808 To 12/31/9999 STs.

Date	Wages	Shift	Hours	Number	Unit	Amount	Val Basis
02/14/2003	1202	On Call	1.00	0.00		0.00	
02/11/2003	1202	On Call	1.00	0.00		0.00	
02/07/2003	1202	On Call	1.00	0.00		0.00	
02/03/2003	1202	On Call	1.00	0.00		0.00	
02/02/2003	1139	InclAwds	0.00	0.00		90.00	
02/01/2003	1183	Mileage	0.00	0.00		20.00	
01/24/2003	1182	TeleRem	0.00	0.00		32.56	

1 of 7

TST (1) (310) kaka DNR 08:17

This shows all the other pay items that have originated from the time entry screens. To limit the list to a specific time frame, enter from and to dates. To get a detailed view of a specific transaction, click in the box next to the transaction and then click on the word “Choose” in the upper left corner under the green-circled check mark. The following screen will appear:

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
The screenshot shows the SAP 'Display Employee Remuneration Info' window. The left sidebar contains a 'Find by' section with options: Person, Collective search help, Search term, and Free search. The main area displays employee information for 'Benjamin'. The 'Personnel no.' is 131207, 'Name' is Benjamin, and 'Status' is Active. The 'EE group' is 1, 'Active Hlf - Leave' is selected, 'Personnel at' is 0001, and 'State of Utah' is selected. The 'W/S rule' is 0200, '10MTwF' is selected, 'SSN' is 111-11-1111, 'Date' is 01/24/2003, and 'Chg.' is 02/21/2003 PHANSEN. The 'Remuneration info' section shows 'Wage type' as 1182 Telephone Reimbursement, 'Number of hours' as 0.00, 'Number/unit' as 0.00, 'Amount' as 32.56, 'Currency' as USD, 'Extra pay/valuation' as 0.00, 'Pay scale group/level' as 00000000, 'Position/work center' as 00000000, 'Overtime comp. type' as Depends on wage type, 'Premium' as 0000, 'Tax area record type' as 0000, and 'External document number' as 0000. The status bar at the bottom indicates 'Info type record was created using the Time Sheet' and shows the user 'TST (11310) Jaka DNR' at 9:31 AM.

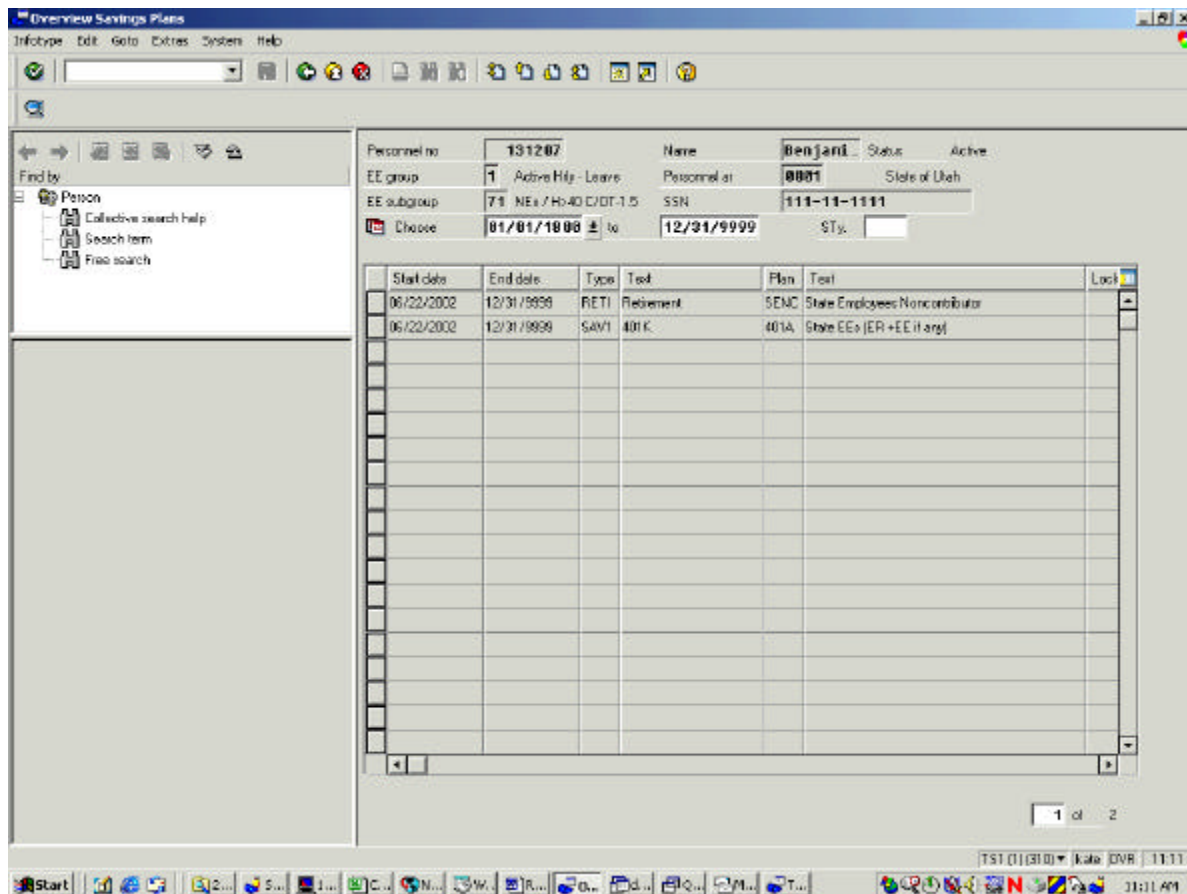
The date the transaction was entered and the logon Id. of the person who entered the transaction appears next to the abbreviation “Chg.” situated under the employee’s SSN.


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Infotypes under the tab – URS: Some infotypes are repeated under this tab. Since they were described previously, examples for Personal Data, Addresses, Date Specifications, and Recur. Payments/Deds. are not repeated in this section. This section does not include an example of the General Benefits Information infotype because the information is the same for all employees and does not provide useful information at this time.

- Savings Plans – Shows the retirement plan and deferred compensation plan(s) for which the employee is enrolled. To get the list shown below, select “Savings Plans.” And click on the overview icon .



This shows all the savings plans for which the employee was/is enrolled. To limit the list to a specific time frame, enter from and to dates. To get a detailed view of the plan, click in the box next to the plan and then click on the detail icon  in the upper left corner under the green-circled check mark. The following screen will appear:

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Display Savings Plans

Infotype Edit Goto Extras System Help

Find by: Person

Personnel no: 131207 Name: Benjamin Status: Active

EE group: 1 Active Hlf - Leave Personnel at: 0001 State of Utah

EE subgroup: 71 NEs / Ho-40 C/OT-1.5 SSN: 111-11-1111

Start: 06/22/2002 to: 12/31/9999 Chng: 01/09/2003 CONVERT

Plan: 401A State EEs (ER+EE if any)

Plan data Administration Regular contrib. Bonus contribution Beneficiaries Investments Additional data

General plan data

Benefit area: UT State of Utah

Plan type: SAU1 401K

Benefit plan: 401A State EEs (ER+EE if any)

Planning Parameters

EE contrib. variant: CON1 401A EE Con Var

ER contrib. variant: CON2 401A ER Con Var

Vesting rule:

Investment group:

This screen shows the start and end date of the plan, the plan code (401A), plan type (401K), and the plan name (State EEs (ER+EE if any)). As part of the State's retirement benefit package for most state employees, the state contributes to an individual 401k. The employee can also contribute an amount every payday. Click on the "Regular contrib." tab to see how much, if any, the employee has elected to contribute in addition to the State's contribution and the following screen will appear:

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The screenshot displays the 'Display Savings Plans' interface. On the left is a navigation pane with options like 'Person', 'Collective search help', 'Search term', and 'Free search'. The main area shows employee data for Benjamin (Personnel no. 131207, Name Benjamin, Status Active). Below this, the 'Plan' is identified as 401A. The 'Pre-tax contribution' section shows a percentage of 1.50, while the 'Post-tax contribution' section shows 0.00. The 'Reference period for contributions' is set to 8-weekly. The bottom of the window shows a taskbar with various application icons and a system clock indicating 2:07 PM.

This screen shows that the employee contributes 1.5% of their pay to the 401K savings plan in addition to what the employer contributes. This screen would show all zeros if the employee was making no additional contributions. The amount the employer contributes is not shown in this area. The employer paid percentage is only available to the central plan administrators. (The other tabs on this screen are not currently in use.)

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Infotypes under the tab – PEHP: Some infotypes are repeated under this tab. Since they were described previously, examples for Personal Data, Addresses, Date Specifications, and Recur. Payments/Deds. are not repeated in this section. This section does not include an example of the General Benefits Information infotype because the information is the same for all employees and does not provide useful information at this time.

- Health Plans – Shows the employer provided medical and dental insurance plans. To get the list shown below, select “Health Plans” and click on the overview icon



Overview Health Plans

Infotype: Edit: Goto: Extras: System: Help

Personnel no: 131207 Name: Benjamin Status: Active

EE group: 1 Active Hlp - Leave Personnel at: 0001 State of Utah

EE subgroup: 71 NEs / Ho40 C/DT-1.5 SSN: 111-11-1111

Choose: 01/01/1900 to 12/31/9999 STy:

Start date	End date	Type	Text	Plan	Text	Lock
06/22/2002	12/31/9999	DENT	Dental	DPRE	PEHP Preferred Dental	
06/22/2002	12/31/9999	MED1	Medical 1	SUMM	Summit Care	

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TS1 (1) (310) kate DVR 10:49

This shows all the health plans for which the employee was/is enrolled. To limit the list to a specific time frame, enter from and to dates. To get a detailed view of the plan, click in the box next to the plan and then click on the detail icon in the upper left corner under the green-circled check mark. The following screen will appear:

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The screenshot shows the 'Display Health Plans' window in SAP. The left sidebar has a 'Find by' section with options: Person, Collective search help, Search term, and Free search. The main area displays data for a specific personnel record:

Personnel no:	131207	Name	Benjamin	Status	Active
EE group	1	Active Hlf - Leave	Personnel at	0001	State of Utah
EE subgroup	71	NEA / Ho-AD C/OT-1.5	SSN	111-11-1111	
Start	06/22/2002	to	12/31/9999	Chng	01/09/2003 CONVERT
Plan	SUMM Summit Care				

Below this, there are tabs for 'Plan data', 'Administration', 'Costs', 'Dependents', and 'Additional data'. The 'Plan data' tab is selected, showing 'General plan data' and 'Planning Parameters'.

General plan data	
Benefit area	UT State of Utah
Plan type	MED1 Medical 1
Benefit plan	SUMM Summit Care
Health plan option	PRET Pre-tax
Dependent coverage	EE Employee Only
Planning Parameters	
Cost rule variant	CST1 SUMME Only Cost Var

The bottom status bar shows 'TST (1) (310) | kate | CWR | 1658' and the system clock '4:58 PM'.

This screen shows the start and end date of the plan, the general plan data such as plan code (SUMM), the plan name (Summit Care), Dependent coverage (Employee Only), etc. Click on the “Costs” tab to see both the employee and employer costs:

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The screenshot shows the SAP 'Display Health Plans' window for employee Benjamin. The 'Calculated costs' section displays the following data for the period ending 02/24/2003:

Category	Amount (USD)
Employee costs	2.31
Employer costs	113.35
Provider costs	115.66

The 'Individual costs employee' section shows an alternative cost amount of 0.00 and costs for bonus of 0.00.



This screen shows that the employee and employer costs each payday are \$2.31 and \$133.35 respectively.

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- Insurance Plans – Shows employer provided life insurance coverage

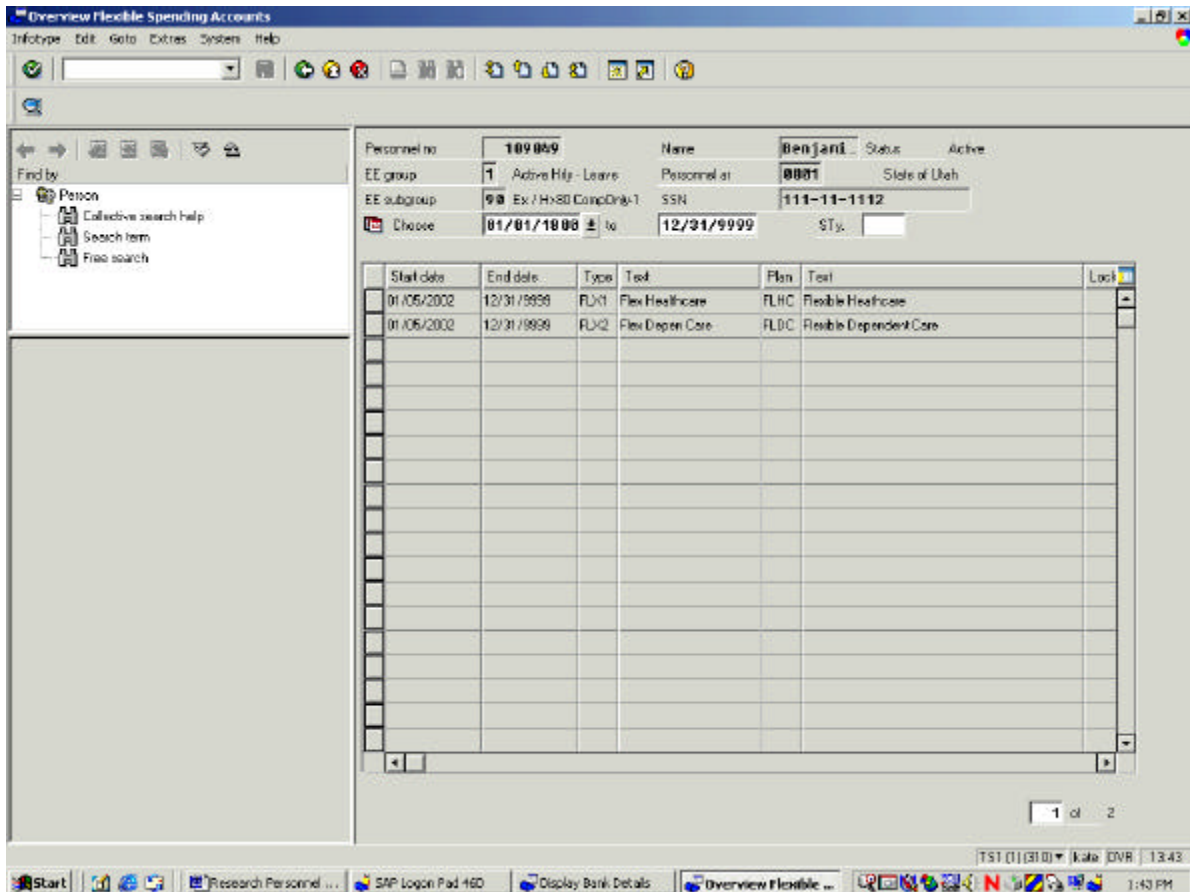
The screenshot shows the 'Display Insurance Plans' window in SAP. The left sidebar contains a 'Find by' section with options: Person, Collective search help, Search term, and Free search. The main area displays employee data for Benjamin (Personnel no. 131207, Name Benjamin, Status Active). Below this, the 'Plan' is identified as 'SPPL State Paid PEHP Life'. A tabbed interface at the bottom shows 'Plan data' selected, with sub-tabs for 'Administration', 'Insurance cov.', 'Costs', and 'Beneficiaries'. The 'General plan data' section includes fields for Benefit area (UT - State of Utah), Plan type (SPPL - State Paid PEHP Life), Benefit plan (SPPL - State Paid PEHP Life), and Insurance option (OPT1 - SPPL Plan Option). The 'Planning Parameters' section shows Coverage variant (COU1 - SPPL Coverage Var) and Cost rule variant (CST1 - SPPL Cost Variant). The window title bar indicates 'TST (1) (310) | kate | JWR | 17:22' and the taskbar shows the time as 5:22 PM.

This screen shows the general plan data. Click on the “Insurance cov.” tab to see the amount of life insurance coverage and the “Costs” tab for the per pay period costs. If the employee were provided more than one life insurance plan, it could be viewed by clicking on the “Previous record” or “Next record “ icons   in the upper left corner.

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Accelerated SAP		BUSINESS PROCESS PROCEDURE	
State of Utah	Organization/Area: Agency Payroll Administration	Title of Process: Research Personnel Master Data	
File Name:	H:\TRAINDOC\FOLIO\Payroll\convert\6 Research Personnel Master Data.doc	Release:	R/3 4.6C
Responsibility:	Payroll Coordinator	Status:	Issued: 2/26/200 Revised: 10/27/2003

- Flexible Spending Accounts – Show the employee's optional Health and Dependent care flexible spending accounts. To get the list shown below, select "Flexible Spending Accounts" and click on the overview icon .



Overview Flexible Spending Accounts

Info type Edit Goto Extras System Help

Personnel no. 109059 Name Benjamin Status Active

EE group 1 Active Hlg - Leave Personnel at 0001 State of Utah

EE subgroup 90 Ex / Hx80 CompDm-1 SSN 111-11-1112


Choose 01/01/1988 to 12/31/9999 STs:

Start date	End date	Type	Test	Plan	Test	Lock
01/05/2002	12/31/9999	FLHC	Flex Healthcare	FLHC	Flexible Healthcare	
01/05/2002	12/31/9999	FLDC	Flex Depen Care	FLDC	Flexible Dependent Care	

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TST (1) (310) Jaka DNR 1:43

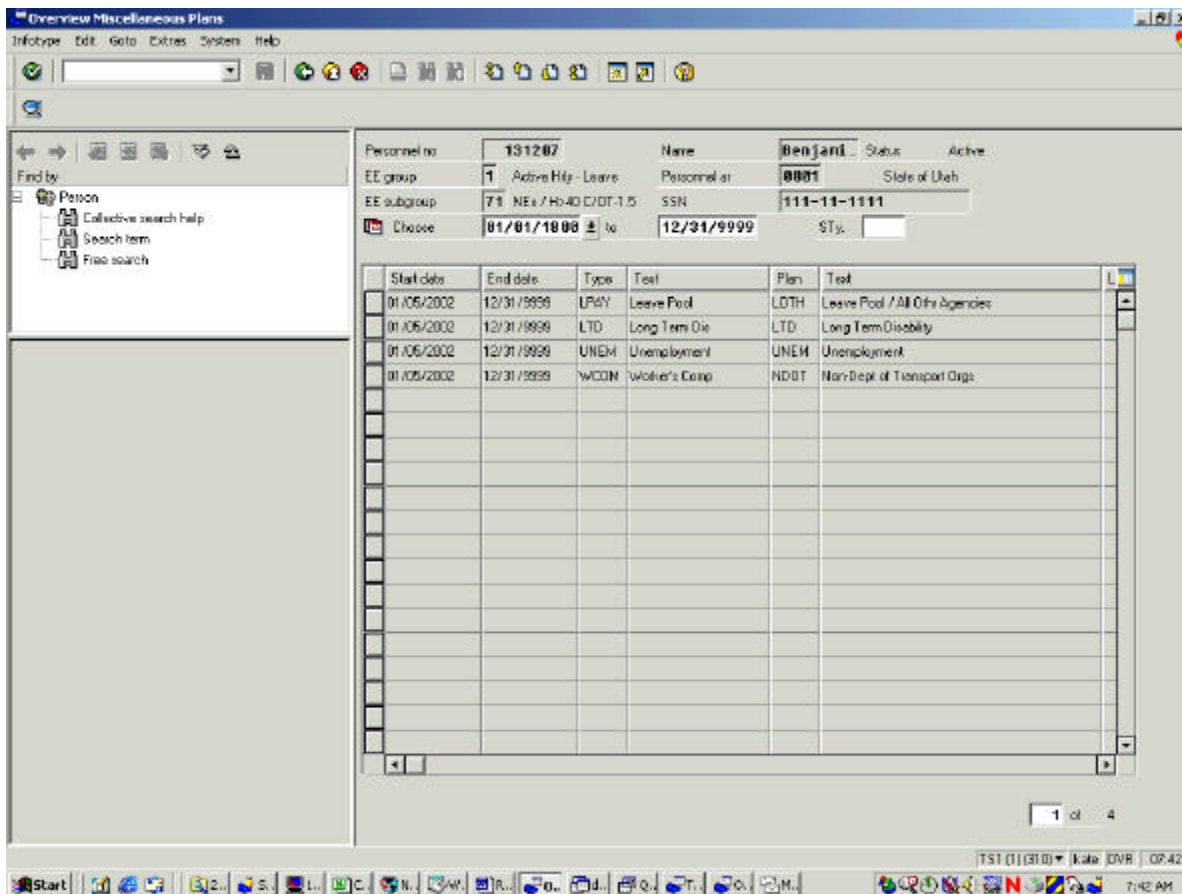
Start Research Personnel ... SAP Login Pad 460 Display Bank Details Overview Flexible ... 1:43 PM

This shows all the Flex plans for which the employee was/is enrolled. To limit the list to a specific time frame, enter from and to dates. To get a detailed view of the plan, click in the box next to the plan and then click on the detail icon  in the upper left corner under the green-circled check mark.

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Accelerated SAP		BUSINESS PROCESS PROCEDURE	
State of Utah	Organization/Area: Agency Payroll Administration	Title of Process: Research Personnel Master Data	
File Name:	H:\TRAINDOC\FOLIO\Payroll\convert\6 Research Personnel Master Data.doc	Release:	R/3 4.6C
Responsibility:	Payroll Coordinator	Status:	Issued: 2/26/200 Revised: 10/27/2003

- Miscellaneous Plans – Shows the employee's other benefits such as Workers Compensation insurance, Unemployment insurance, etc. To get the list shown below, select "FSA Claims" and click on the overview icon .



Overview Miscellaneous Plans

Infotype Edit Goto Extras System Help

Personnel no. 131207 Name Benjamin Status Active

EE group 1 Active Hlp - Leave Personnel at 0001 State of Utah


EE subgroup 71 NEs / Ho40 C/DT-1.5 SSN 111-11-1111

Choose 01/01/1998 to 12/31/9999 STs.

Start date	End date	Type	Text	Plan	Text
01/05/2002	12/31/9999	LP4Y	Leave Pool	LDTH	Leave Pool / All Other Agencies
01/05/2002	12/31/9999	LTD	Long Term Dis	LTD	Long Term Disability
01/05/2002	12/31/9999	UNEM	Unemployment	UNEM	Unemployment
01/05/2002	12/31/9999	WCON	Worker's Comp	NDOT	Non-Dept of Transport Orgs

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TST (1) (310) | kaka | DNR | 07:42

This shows all the health plans for which the employee was/is enrolled. To limit the list to a specific time frame, enter from and to dates. To get a detailed plan view, click in the box next to the plan and then click on the detail icon  in the upper left corner of the screen.

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